



# The Technical Services Learning Organization: Transformation Through Training and Development

**Marlee Givens and Sofia Slutskaya**

# About us



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# Introduction

**ALA**AmericanLibraryAssociation

*“Training is a principle method for adapting organization’s workforce to a changing environment”*



# Training Within Industry<sup>©</sup> history



## HOW TO GET READY TO INSTRUCT

### ***Have a Time Table—***

how much skill you expect him to have, by what date.

### ***Break Down the Job—***

list important steps.  
pick out the key points. (Safety is always a key point.)

### ***Have Everything Ready—***

the right equipment, materials, and supplies.

### ***Have the Workplace***

***Properly Arranged—***  
just as the worker will be expected to keep it.

### ***Job Instruction Training***

## TRAINING WITHIN INDUSTRY

Bureau of Training

War Manpower Commission

## KEEP THIS CARD HANDY

GPO 16-35140-1

Front of the Job Instruction Card

## HOW TO INSTRUCT

### ***Step 1—Prepare the Worker***

Put him at ease.

State the job and find out what he already knows about it.

Get him interested in learning job.  
Place in correct position.

### ***Step 2—Present the Operation***

Tell, show, and illustrate one IMPORTANT STEP at a time.

Stress each KEY POINT.

Instruct clearly, completely, and patiently, but no more than he can master.

### ***Step 3—Try Out Performance***

Have him do the job—correct errors.

Have him explain each KEY POINT to you as he does the job again.

Make sure he understands.

Continue until YOU know HE knows.

### ***Step 4—Follow Up***

Put him on his own. Designate to whom he goes for help.

Check frequently. Encourage questions.

Taper off extra coaching and close follow-up.

16-35140-1

***If Worker Hasn't Learned,  
the Instructor Hasn't Taught***

Back of the Job Instruction Card

# Impact of TWI on the War Effort

Of the 600 client companies monitored by the TWI Service throughout the war:

- 86% increased production by at least 25%
- 100% reduced training time by 25% or more
- 88% reduced labor-hours by over 25%
- 55% reduced scrap by at least 25%
- 100% reduced grievances by more than 25%



# Instructional design

**ALA**AmericanLibraryAssociation

# Adult learning theories



Learning must be relevant



Learning must tap into prior knowledge



Learning must be timely



Learning must be experiential



# How adults learn

- Stimulate attention
- Arouse emotion
- Focus on objectives
- Reproduce environment
- Match new content to prior knowledge
- Manage cognitive load
- Scaffolding
- Rehearsal
- Retrieval
- Feedback and assessment

# Instructional design models

ADDIE

Backwards  
Design

Bloom's  
Taxonomy

Cathy Moore's  
Action  
Mapping

Dick & Carey

# Is training necessary?



Motivation



Environment



Knowledge



Skills

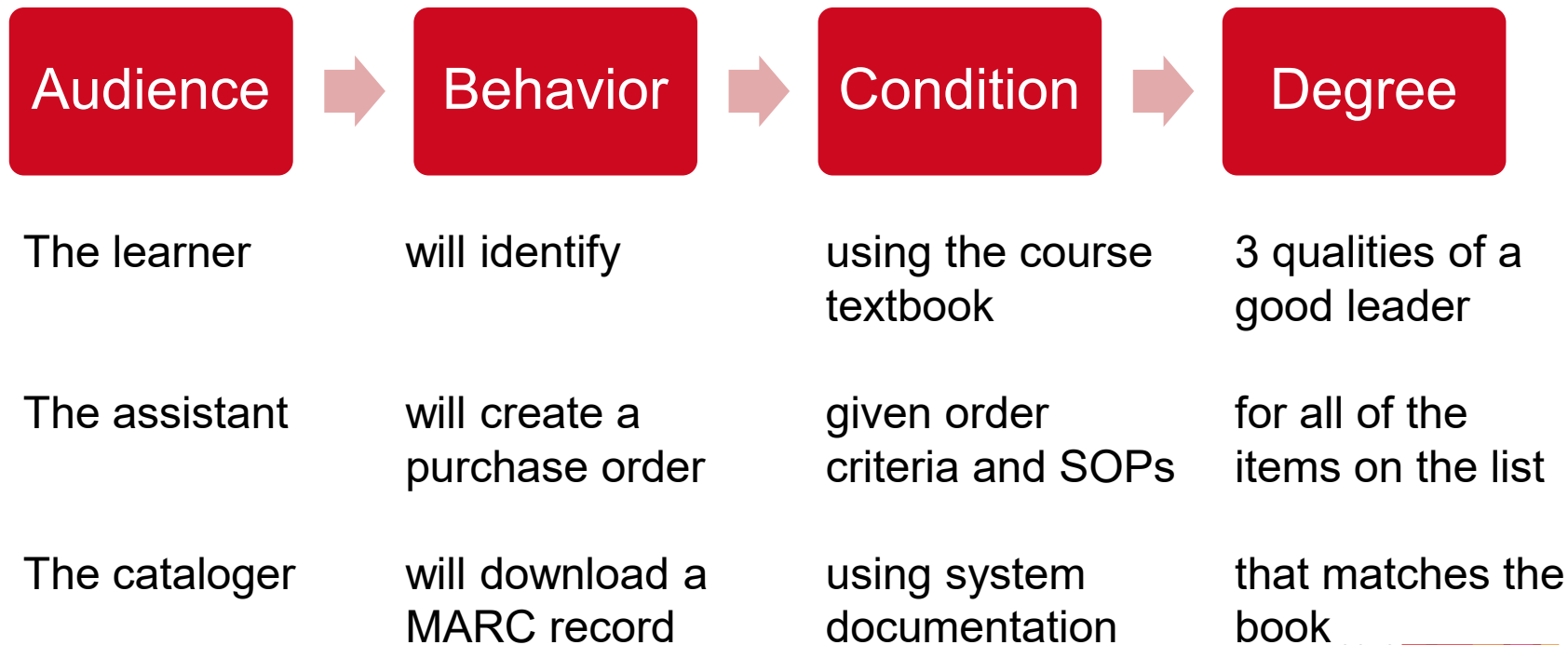


# Learning outcomes

# Learning outcomes go ABCD

- Audience (who)
- Behavior (will do what)
- Condition (when, how, with assistance, etc.)
- Degree (how well)

# ABCD



# Learning outcomes are SMART

- Specific
- Measurable
- Attainable
- Relevant
- Time-bound

# SMART?

- After five lessons, the student will be able to juggle 3 balls for 1 minute without dropping them more than once



# SMART?

- By the end of this training, the learner will be able to describe the process for setting holdings in OCLC

# SMART?

- By the end of the workshop, the student will know how to use library databases

# SMART?

- By the end of the workshop, the student will know how to use **Boolean operators and wildcards** in library databases

# SMART?

- At the conclusion of the training, the assistant will be able to use a keyboard shortcut to add a delimiter in a MARC field

# SMART?

- At the conclusion of the training, the assistant will be able to use a **keyboard shortcuts** ~~to add a delimiter in a MARC field~~

# SMART?

- The learner will understand cataloging



~~KNOW~~

~~UNDERSTAND~~



# SMART?

- ~~• The learner will understand cataloging~~
- How will I know that learner understands cataloging?



# SMART?

- ~~• The learner will understand cataloging~~
- How will I know that learner understands cataloging?

Can match an item to an OCLC record using matching guidelines

Using RDA, can transcribe an item title with correct capitalization and punctuation

Can add Cutter number using Cutter table and shelflist

Using LCGFT, can apply genre terms for feature film DVDs

# Build a SMART learning outcome

- ~~• The learner will understand cataloging~~
- At the end of the training, the cataloger will use matching record documentation to select and export OCLC records

# Blooms Verbs

## Remember

Arrange  
Define  
Locate  
Recall  
Recite  
Describe  
Repeat  
Identify  
Select  
Quote  
Label  
Copy  
List  
Name  
State

## Understand

Classify  
Describe  
Identify  
Indicate  
Organize  
Interpret  
Illustrate  
Reorganize  
Translate  
Paraphrase  
Summarize  
Transform  
Discuss  
Explain  
Defend  
Compare  
Report  
Restate  
Review  
Rewrite

## Apply

Calculate  
Construct  
Demonstrate  
Estimate  
Illustrate  
Interpret  
Appraise  
Contrast  
Criticize  
Diagnose  
Identify  
Classify

## Analyze

Combine  
Figure  
Find  
Sketch  
Solve  
Predict  
Change  
Survey  
Compare  
Diagram  
Examine  
Test  
Modify

## Evaluate

Appraise  
Argue  
Assess  
Defend  
Estimate  
Judge  
Predict  
Qualify  
Rate  
Support  
Critique  
Recommend

## Create

Arrange  
Assemble  
Compose  
Design  
Devise  
Formulate  
Invent  
Manage  
Modify  
Organize  
Plan  
Prepare  
Produce  
Propose  
Set Up  
Verify  
Construct  
Develop

# Learning with standard work

- Use behaviors and conditions from your work instructions
- Tie training to standard work

## 5.0 Procedure:

Procedure: Accessioning Archival Collections	
Start of process	
Step 1	Receive collection needing to be accessioned and accession request from Head of Archives. <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF8BC14A8-9A76-4D60-A7CD-C9DA92BDF391%7D&amp;file=LRC.INFRA.ARC.W0019.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF8BC14A8-9A76-4D60-A7CD-C9DA92BDF391%7D&amp;file=LRC.INFRA.ARC.W0019.docx&amp;action=default</a>
Step 2	Review collection and apply preservation practices <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF89DEAF4-470D-441C-9DCF-CB830D368A02%7D&amp;file=LRC.INFRA.ARC.W0020.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF89DEAF4-470D-441C-9DCF-CB830D368A02%7D&amp;file=LRC.INFRA.ARC.W0020.docx&amp;action=default</a>
Step 3	Create Inventory <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B3FE46ACC-80CA-44F9-8018-CCAB15FA8075%7D&amp;file=LRC.INFRA.ARC.W0021.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B3FE46ACC-80CA-44F9-8018-CCAB15FA8075%7D&amp;file=LRC.INFRA.ARC.W0021.docx&amp;action=default</a>
Step 4	Instructions for creating Accession record in ASpace <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BED8FBF8F-53AA-4595-A152-73346A0673D4%7D&amp;file=LRC.INFRA.ARC.W0022.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BED8FBF8F-53AA-4595-A152-73346A0673D4%7D&amp;file=LRC.INFRA.ARC.W0022.docx&amp;action=default</a>
Step 5	Prep collection for transport to LSC <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF5D87F7C-1C5D-4D4D-9B35-A0A6FC3E67F8%7D&amp;file=LRC.INFRA.ARC.W0023.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF5D87F7C-1C5D-4D4D-9B35-A0A6FC3E67F8%7D&amp;file=LRC.INFRA.ARC.W0023.docx&amp;action=default</a>
Step 6	Notify LSC Operations Manager and Head of Archives <a href="https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B59ABC42F-1C42-49D1-8FE6-4569FC4C1463%7D&amp;file=LRC.INFRA.ARC.W0024.docx&amp;action=default">https://gtvault.sharepoint.com/sites/LE/dept/archivesrecmgmt/_layouts/15/WopiFrame.aspx?sourcedoc=%7B59ABC42F-1C42-49D1-8FE6-4569FC4C1463%7D&amp;file=LRC.INFRA.ARC.W0024.docx&amp;action=default</a>
End of process	



# Training plans

# Training Within Industry<sup>©</sup> principles

Any training program developed using TWI had four rules:

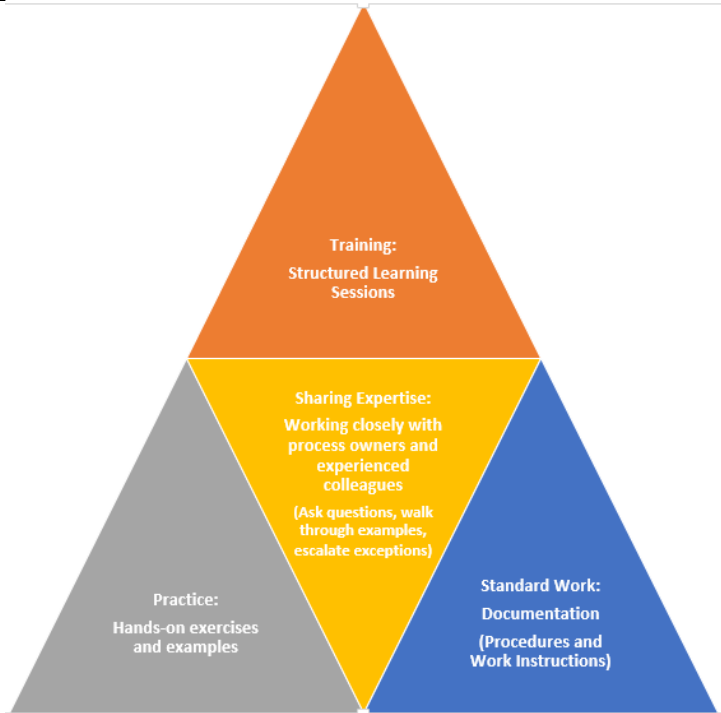
- Training must be **simplified**
- Training should use **minimal didactic presentation**
- Training must be built around the core premise of **“learning-by-doing”**
- The training must create a **multiplier effect**; the trainee can teach the mastered skill exactly as learned to someone else (Dinero, 2005).

“HOW TRAINING CAN BE DONE—METHODS, AIDS”

CHOOSE THE BEST METHOD

	<u>Use it</u>	<u>Don't Use It</u>
DEMONSTRATION	To show a manipulative operation. To clarify principles or theories To show use of equipment	When note-taking is required  In place of practice
PRACTICE	To develop performance skill To help in retaining information	On a theoretical problem, but only on a real one
DISCUSSION	To make people think To emphasize factual material To warm up or review To give reasons	To fill in time Without a good leader To present new material In place of practice
CONFERENCE MEETINGS	To get benefit of previous experience To get opinions and help To modify opinions To develop understanding To get acceptance	Unless people are already informed about the subject  As initial training  In place of practice
LECTURE MEETINGS	When presenting informational material or explanatory material  Supplemented by visual aids	For material with many details For training in a skill

# Need for training and hands on practice



1. Subject Matter Experts create standard work
2. Subject Matter Experts develop and deliver training
3. All staff participates in basic training covering all areas
4. All staff participates in hands-on practice
5. Anonymous survey of all staff members conducted immediately after the training and hands on practice



# Types of documents

## Procedure: Cataloging e-books

Start: Set of e-books acquired from a new vendor. It is determined that MARC records need to be loaded

Step 1 Determine the source for MARC records (vendor or OCLC)

Step 2 Download MARC file

Step 3 Evaluate records according to the checklist

Step 4 Edit records in MARCCedit to meet local requirements.

Step 5 Create local collection

Step 6 Create import profile

Step 6 Import records and create portfolios

Step 7 Test in ALMA and Primo

End: Records for new e-books are discoverable in Primo

## Overview

Physical items can include books, DVDs, and CDs. These items may be owned by faculty (non-repository item) or by GT (repository item). Below is a high-level overview of the Reserves process for physical items:

WHO:	SYSTEM:	ACTION:
Faculty	Email	Reserve request is emailed to <a href="mailto:customersupport@library.gatech.edu">customersupport@library.gatech.edu</a> . This creates a ticket in Jira for the Library Customer Support group.
LRC	Alma	Process Reserve request in Alma. If item is at the LSC, a Work Order is created which sends request to LSC.
LSC	Alma/Meyer	Pull the item from the warehouse and deliver it to the LRC.
LRC	Alma/Ares/Jira	Update information in Alma; process in Ares; affix appropriate labels on item; send item to Main Library; close Jira ticket.
Main Library	Alma	If repository item, scan into Alma. Place on Reserves shelf.

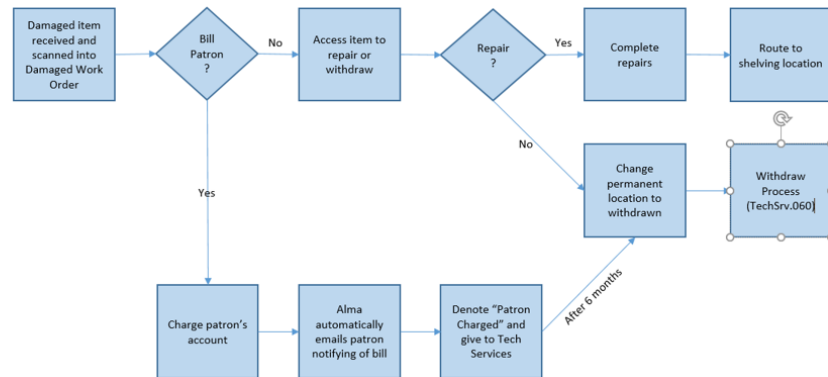
Electronic items can include PDF files and links to articles, e-books, or streaming audio/video. Links do not actually go on "reserve" as once GT has obtained access to the link, that access is not limited to students in a particular class. Therefore electronic links do not need to be processed in Alma or Ares. PDFs are added to Ares only (not Alma). Below is a high-level overview of the Reserves process for electronic items:

### PDFs:

WHO:	SYSTEM:	ACTION:
Faculty	Email	Reserve request with PDF attachment is emailed to <a href="mailto:customersupport@library.gatech.edu">customersupport@library.gatech.edu</a> . This creates a ticket in Jira for the Library Customer Support group.
LRC	Ares	Process Reserve request in Ares; close Jira ticket.

# Types of documents

## Overview



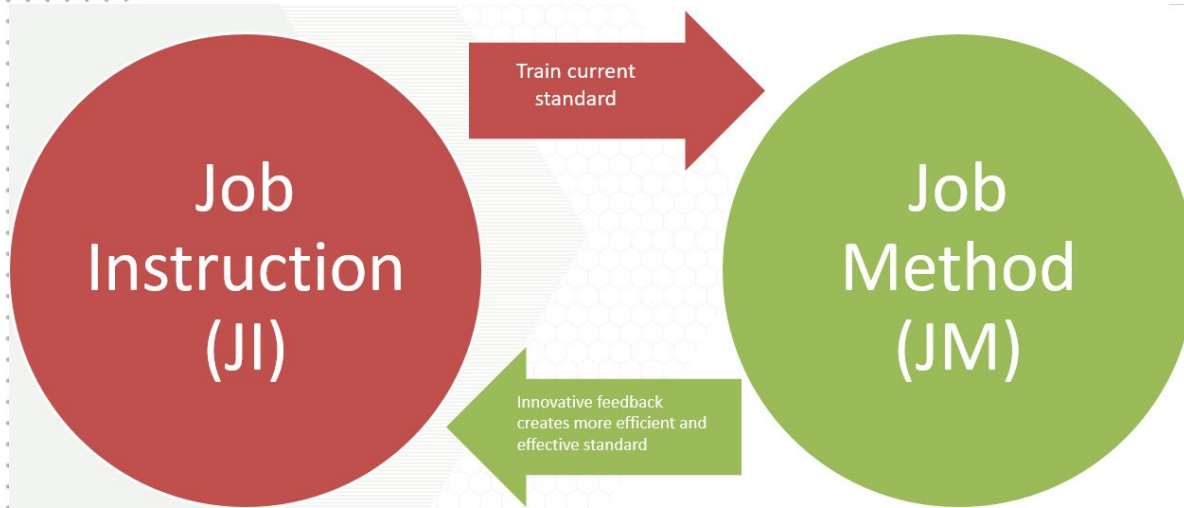
Public Services is responsible for:

- Clearing the title from the patron's account
- Making the determination if the patron will be billed
- Charging the patron's account (if applicable)
- Including note in book "Damaged – patron charged" (if applicable)
- Scanning title into Damaged Work Order in Alma

Technical Services is responsible for:

- Making the determination if the title can be repaired or not (if patron is billed, no attempts at

# Training Within Industry<sup>®</sup> principles



Steps	Job Instruction	Job Methods
1	Prepare the worker	Break down the job
2	Present the operation	Question every detail
3	Try out performance	Develop the new method
4	Follow up	Apply the new method

# Training plan and timetable (overall)

	Name	Name	Name	Changes in Production
Archives	✓			
Cataloging	✓	★	✓	
Acquisitions			✓	
Repository	✓	✓		
Digitization	✓	02/01	02/01	Need 2 more people in March
ILL		✓		
Reserves	★	✓	✓	
Turn Over Work performance		Needs more training in Archives		

# Training plan and timetable (specific area)

	Monograph copy cataloging	Serial copy Cataloging	LHR maintenance	DVD/Media cataloging	E-books cataloging	Batch record updates	Authority work
Name	○	○					
Name	○						
Name	●	●	●	●	○	○	
Name	○			○			□

## Levels legend:

- - can train others
- - can perform work
- - needs training

Level	Explanation
1	Not trained
2	Future training
3	In training
4	Certified: within cell
5	Trainer: certified all cells



## Reserves



Placing items on hold for a specific class' use; ensuring compliance with copyright laws.

Link to Training Document



Reserves Basic Steps / Skills



0/15

Reserves Advanced Steps / Skills



0/14

Runae Knight (basic)



Dec 31, 2018



0/18

+ Add another card



## Cataloging



The process of creating metadata representing an item (book, DVD, map) in Alma.

Links to Training Documents



Cataloging Basic Steps / Skills



0/11

Cataloging Advanced Steps / Skills



0/5

Cataloging - Run Batch Jobs in Alma  
(Steps / Skills)

Jackie D-Run Batch Jobs in Alma



0/2

+ Add another card



## Acquisitions



The purchase of new physical and electronic items.

Links to Training Documents



1

Acquisitions Basic Steps / Skills



1

0/26

Acquisitions Advanced Steps / Skills

Windy-print rec & inv



0/6

Jackie D-database activation



0/2

Karen-database activation



0/2

Karen-database invoicing



0/8

Jackie B-database invoicing

+ Add another card



## Cataloging Basic Steps / Skills

in list [Cataloging](#)

### Description Edit

When it is determined an employee will be assigned training:

- Add a card with their name on it to the list
- Copy the checklist below to their card
- Employee will check off each item as they become proficient

### ☒ Cataloging Basic Steps / Skills Delete

0%

- ☐ search OCLC Connexion
- ☐ search OCLC from Alma MD Editor
- ☐ identify and import accurate bib record from OCLC
- ☐ create holding in Alma
- ☐ bar code item
- ☐ set holding in OCLC
- ☐ edit bibs record
- ☐ edit holding record
- ☐ edit item

#### SUGGESTED ⚙️

 [Join](#)

[Feedback](#)

#### ADD TO CARD

 [Members](#)

 [Labels](#)

☒ [Checklist](#)

 [Due Date](#)


 [Attachment](#)

 [Cover](#)

#### POWER-UPS

[Get Power-Ups](#)

Get unlimited Power-Ups, plus much more.

 [Upgrade Team](#)

#### ACTIONS

[→ Move](#)

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# Thank you!

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